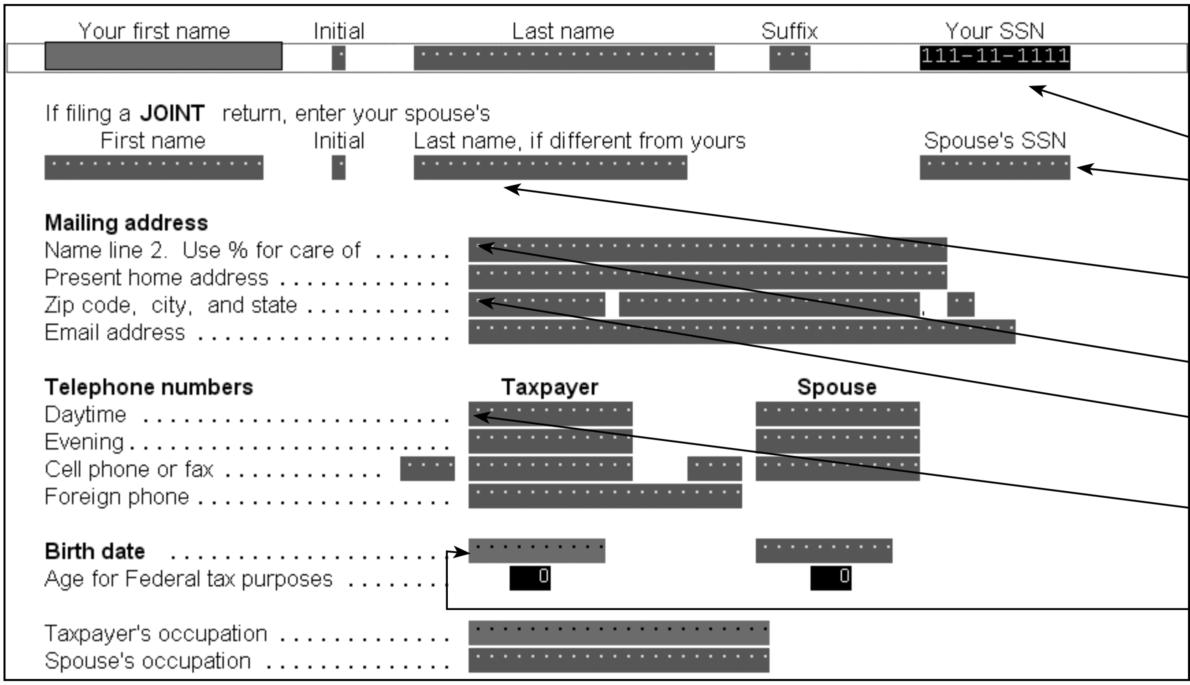
Main Information Screen


Your first name | Initial | Last name | Suffix | Your SSN
111-11-1111

If filing a **JOINT** return, enter your spouse's
First name | Initial | Last name, if different from yours | Spouse's SSN

Mailing address
Name line 2. Use % for care of ......
Present home address ....
Zip code, city, and state ....
Email address ....

Telephone numbers | **Taxpayer** | **Spouse**
Daytime ....
Evening........................
Cell phone or fax ....
Foreign phone ....

Birth date ....
Age for Federal tax purposes .... 0 | 0

Taxpayer's occupation ....
Spouse's occupation ....

Do not use punctuation marks (period, comma, or hyphen).

Verify

Enter spouse SSN.

Verify spouse last name with SS card. If different from taxpayer, enter last name here.

Note 1: see below.

Enter zip code first. (See note 2.)

Always ask for at least one telephone number.
Enter area code first.

Must input birth date. Include spouse if joint return.
Enter as mmddyyyy (program will enter slash marks).

Note 1: Use only if an additional name is needed for "in care of," for a two line street address, or in the case of a deceased taxpayer. Enter the name of the person filing the return for the deceased person. This may be the surviving spouse if the filing status is Married Filing Jointly or a personal representative such as an executor, administrator, or anyone who is in charge of the deceased taxpayer's property. When you print the return, the tax software prints the date of death and DECD next to the deceased person's name in the address area at the top of Form 1040 page 1, as required by the IRS.

Note 2: Once the zip code is entered TaxWise® will then auto-fill the city and state. The auto entry can be changed if needed.

Main Information Screen (continued)

Foreign Address
Foreign street address . . . .
Foreign city, state, province, Zip code
Foreign country. Do not abbreviate . . . .

Do not use foreign address field for APO/FPO addresses. (See Note 1.)

Taxpayer Information

Special processing . . . .

If the taxpayer served in a combat zone during the tax year, click on this box and select the name of the combat zone from the dropdown menu, or choose "Combat Zone." This will identify the return to the IRS, and can avoid certain reject conditions, such as federal withholding exceeding 50% of the wage amount.

Are you excluding Puerto Rico income from this tax return? . . . . ☐ Yes ☐ No
If "Yes", enter the amount of income excluded . . . . 0.

Defaulted to No.

	Taxpayer	Spouse
Check if blind	☐ Yes	☐ Yes
Check if totally and permanently disabled	☐ Yes	☐ Yes
Date of death, ONLY if in 2011 or 2012		

This tax return is being filed by ☐ the surviving spouse or ☐ someone else.

Important for calculation of standard deduction.

Complete for deceased taxpayer.

Presidential Election Campaign — Check here if you, or your spouse if a joint return, want $3 to go to this fund . . . . ☐ You ☐ Spouse

Ask taxpayer. Answer does not affect refund or balance due.

Filing Status and Exemptions

1 ☐ Single
2 ☐ Married filing jointly (even if only one had income)
3 ☐ Married filing separately
Spouse's first name: Last name: SSN:
Did your spouse ever live with you in 2009? . . . . ☐ Yes ☐ No
If "Yes", did you and your spouse live together at anytime after June 30, 2009? . . . . ☐ Yes ☐ No
Married filing separately, only. If the state in the address above is a community property state (AZ, CA, ID, LA, NV, NM, TX, WA, or WI), or a return is being filed to one of these states, answer the following questions.
Military. Is this your home of record? . . . . ☐ Yes ☐ No
If "Yes", fill in the Community Property Allocation Worksheet.
Others. Are you a resident of this community property state? . . . . ☐ Yes ☐ No
If "Yes", fill in the Community Property Allocation Worksheet and use Form 1040.
If "No", you CANNOT e-file this return.
4 ☐ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter the child's name and social security number . A self-supporting child who lives with you IS NOT a qualifying person.
5 ☐ Qualifying widow(er) with dependent child . . . . . Year spouse died (2007 or 2008 only):

Hint: Only enter child's name and SSN in this section if not being claimed as a dependent.

Verify exemptions. College/high school students or young military personnel who entered the military this tax year may be eligible to be claimed (See Note 2).

6 **Exemptions** a ☒ Yourself b ☐ Spouse Number of boxes checked on 6a and 6b. 1

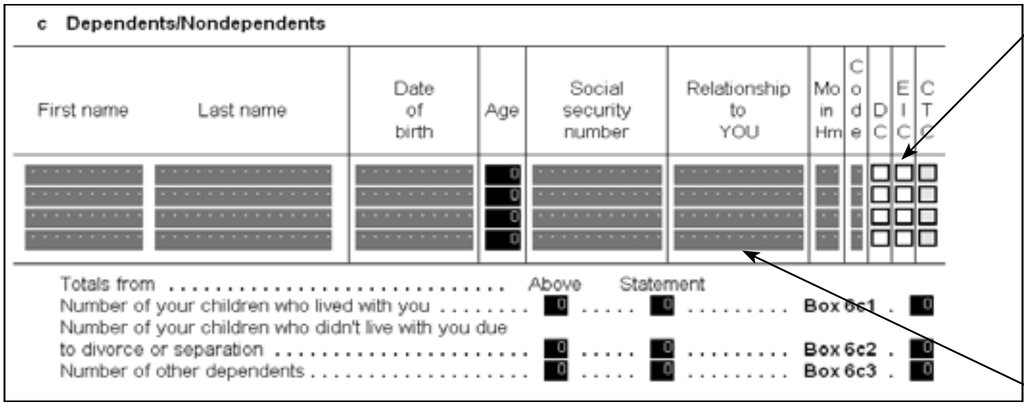
Check if
(a) you can be claimed on another person's return . . . . ☐
(b) filing status 2 and spouse can be claimed on another person's return . . . . ☐
(c) you are using filing status 4 and claiming nonresident alien spouse . . . . ☐
Spouse's first name: Spouse's last name:
Spouse's SSN or ITIN:

Hint: Enter year of death and deceased spouse's name on Name line 2.

Note 1: If the return is for a Canadian resident, the address should be put entirely on the foreign street address line. Leave Zip code, city, and state blank.

Note 2: If someone else is entitled to claim the taxpayer (or spouse), check the appropriate box on line 6 of the Main Information Sheet. If the taxpayer is filing Head of Household and claiming an exemption for a nonresident alien spouse, check the box on line 6c of the software's main information sheet and enter the spouse's first name, last name and SSN or ITIN...on line 6C and on dependent line, also.

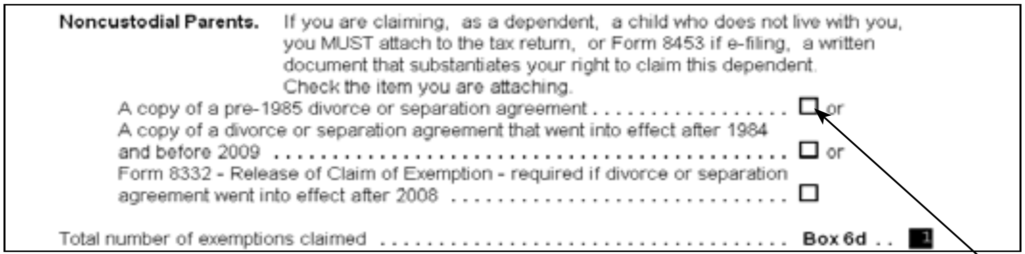
Main Information Screen (continued)



c Dependents/Nondependents

First name	Last name	Date of birth	Age	Social security number	Relationship to YOU	Mo in Hm	Code	DC	EIC	CTC
			0					☐	☐	☐
			0					☐	☐	☐
			0					☐	☐	☐
			0					☐	☐	☐

Totals from	Above	Statement		
Number of your children who lived with you	0	0	Box 6c1	0
Number of your children who didn't live with you due to divorce or separation	0	0	Box 6c2	0
Number of other dependents	0	0	Box 6c3	0



Noncustodial Parents. If you are claiming, as a dependent, a child who does not live with you, you MUST attach to the tax return, or Form 8453 if e-filing, a written document that substantiates your right to claim this dependent. Check the item you are attaching.

A copy of a pre-1985 divorce or separation agreement ☐ or

A copy of a divorce or separation agreement that went into effect after 1984 and before 2009 ☐ or

Form 8332 - Release of Claim of Exemption - required if divorce or separation agreement went into effect after 2008 ☐

Total number of exemptions claimed . . . Box 6d . . 1

Hint: If there is the slightest chance the child will be a qualifying child for EIC purposes, be sure to check the EIC box next to the child's name. TaxWise will not allow the EIC if they do not qualify.

Verify names, SSN, and dates of birth with social security card to prevent rejected returns. ***List children from youngest to oldest.***

Last name—Enter last name only if different from primary taxpayer.

Use down arrow or space bar on [Relationship to YOU], [Mo in Hm], and [Code] columns for valid choices.

DC is credit for child and dependent care expenses.

*EIC is earned income credit.**

CTC is child tax credit—TaxWise® automatically determines if child is a qualifying child based upon your input.

Check applicable box if noncustodial parent or Multiple Support agreement exists.

Enter number of months each individual lived in the taxpayer's home or use MX if the dependent lived in Mexico or CN if the dependent lived in Canada – type in directly or use the drop-down list.

*** EIC must be checked to bring up the applicable EIC forms. If in doubt, check the box.**

Carefully read the information regarding Dependents/Nondependents, and pay special attention to the codes. If the taxpayer is married filing a separate return and is able to claim his/her spouse's exemption, fill in the spouse's name, SSN, and other information in the software Main Information Sheet, Dependents/Non-Dependents section, showing the relationship as "other" and the Code as "3."

Use the Code box to indicate relationship as follows:

1 = Your child who lives with you
2 = Your dependent child who does NOT live with you due to divorce or separation
3 = All other dependents
0 (zero) = Nondependents

If There Are More Than Four Dependents
If there are more than four dependents to list, enter the first four on the Main Information Sheet. To enter the rest of the dependents, open Form 1040, page 1, link from any field in the dependents section. Link to **NEW Addl Deps - Form 1040 Line 6c**, the Additional Dependents Statement. Last names must be used on the Additional Dependents Statement.

TaxWise® carries the first four dependents from the Main Information Screen to the statement. List the remaining dependents below the first four.

Note: Do not list nondependents on the Additional Dependents statement. List nondependents **only** on the Main Information Sheet. Also, children who are qualifying children for EIC or dependent care credit must be entered on the Main Information Sheet.

Qualifying Child(ren) for Earned Income Credit (EIC):
If the taxpayer qualifies (or may qualify) for earned income credit (EIC), you MUST enter the birth date and select the EIC check box for qualifying children. This information carries to Schedule EIC. TaxWise® calculates the amount of earned income credit if the client qualifies based on income and other requirements.

Child Without SSN or ITIN
If the qualifying child is a resident of the U.S. but does not have a valid SSN or ITIN, you must override the CTC box on the Main Information Sheet.

Main Information Screen (continued)

State Information If you are not preparing a state return, check here ☐ or fill in state information below
Full year resident: and Part-year: and Nonresident:

Check box if not preparing state returns.

Type of Return ☐ Bank products ☒ E-file ONLY ☐ Paper

Paper or e-file are only choices.

Select Your Bank ☐ Chase ☐ Republic ☐ Santa Barbara
☐ River City ☐ Other

Do not make entries in this section.

These products are only available to tax preparers registered to offer them.

Do not use this section.

Audit Shield
Does the taxpayer want Audit Shield? . . . . ☐ Yes ☐ No

Fee Collect
Does the taxpayer want to have your tax preparation fees deducted from his or her refund? . . . . ☐ Yes ☐ No

Bank Account Information
Direct deposit available for e-filing, paper returns, or RAL/ERC direct deposit refund.
Electronic Funds Transfer (ACH Debit) available for e-filing only.

Routing transit number (RTN) of financial institution . . . .
Account number (DAN) including hyphens . . . .

RTN must be 9 characters.

Type account number exactly as shown on check. See "Finishing the Return" section for an example of a check.*

****Note: You will also need to add account information on 1040 page 2. See page 12-5 for additional information.***

State Information

A federal return may have as many as 9 state returns attached, in any combination; for example, two different full-year resident states (one for taxpayer and one for spouse), two different part-year states, and five different nonresident states.

Consult instructions for each state to determine which status applies to the taxpayer. To view instructions for the state individual package, select **Help** from any field in the "State Information" section of the Main Information Screen and scroll to State Information. Select **[click here]** and then select the applicable state of interest.

* **Do not use a preprinted deposit slip.**

Main Information Screen (continued)

Self-Select and Practitioner PIN(s)

ERO PIN for both the Self-Select and Practitioner PIN programs 0

Check if using the Practitioner PIN method for e-filing this income tax return or Form 4868 with direct debit . . . . ☐

*Enter **98765***

Check for Practitioner PIN.

What form(s) are you e-filing using PINs?

- The income tax return . . . . ☐
- Form 4868 without direct debit. No PINs required . . . . ☐
- Form 4868 with direct debit . . . . ☐
- * Form 2350 without direct debit . . . . ☐
- * Form 2350 with direct debit . . . . ☐

* Requires date(s) of birth above and 2008 original AGI or 2008 PIN. F8 to change spouse AGI, if incorrect.

Taxpayer's original 2008 AGI: 0. Spouse's original 2008 AGI: 0.

OR taxpayer's 2008 PIN: 0 OR spouse's 2008 PIN: 0

Only first box should be checked.

To use Self-Select PIN, taxpayers must bring their prior year tax return or know their prior year PIN.

Last year's AGI or prior year PIN required for Self-Select PIN.

The following attachments require the submission of Form 8453. Please note that PINs are still required and that Form 8879 must be signed for all e-filed returns.

☐ Form(s) 1098C	☐ Form 3115
☐ Form 3468 attachment required	☐ Form 4136 attachment required
☐ Form 5713	☐ Forms(s) 8283, page 2 and / or appraisal
☐ Form(s) 8332	☐ Form 8858
☐ Form 8864 attachment required	☐ Form 8885 attachments
☐ Schedule D transaction listing	☐ Copy of divorce or separation agreement
☐ Revenue Procedure 2009-20 (Ponzi loss)	

The information below, as well as the ERO PIN above, must be filled in for all e-filed returns.

The date must be entered below. This is today's date: 08/14/2010

Do NOT use @Today.

Taxpayer's PIN 0 Enter 5 numbers, other than all zeroes. Date:

I ☐ authorize ☐ do not authorize

ERO firm name . . . . . to enter this PIN as my signature on my tax year 2009 electronically filed income tax return.

Spouse's PIN . . 0 Enter 5 numbers, other than all zeroes. Date:

I ☐ authorize ☐ do not authorize

ERO firm name . . . . . to enter this PIN as my signature on my tax year 2009 electronically filed income tax return.

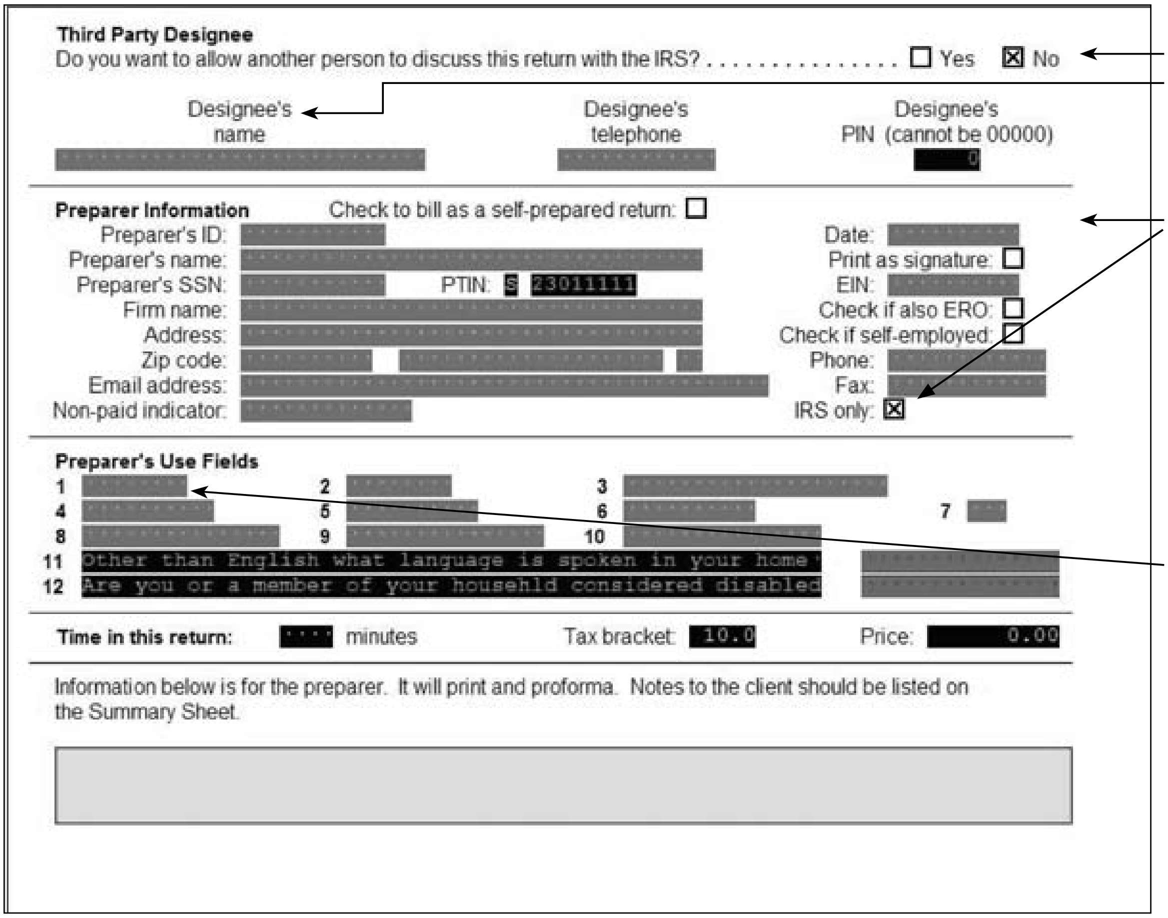
For Practitioner or Self-Select PIN signature, taxpayer(s) must enter a five digit number (not starting with zero). If married filing jointly (MFJ), spouse must also enter PIN.

*Check **do not authorize** for Self-Select PIN.*

*Check **authorize** for Practitioner PIN. (See Note 1)*

Note 1: Preparer can enter PIN for Practitioner PIN, and taxpayer will need to sign Form 8879.

Main Information Screen (continued)



Third Party Designee
Do you want to allow another person to discuss this return with the IRS? . . . . ☐ Yes ☒ No

Designee's name	Designee's telephone	Designee's PIN (cannot be 00000)
		0

Preparer Information Check to bill as a self-prepared return: ☐

Preparer's ID:
Preparer's name:
Preparer's SSN: PTIN: S 23011111
Firm name:
Address:
Zip code:
Email address:
Non-paid indicator:

Date:
Print as signature: ☐
EIN:
Check if also ERO: ☐
Check if self-employed: ☐
Phone:
Fax:
IRS only: ☒

Preparer's Use Fields
1 2 3
4 5 6 7
8 9 10
11 Other than English what language is spoken in your home?
12 Are you or a member of your househld considered disabled

Time in this return: .... minutes Tax bracket: 10.0 Price: 0.00

Information below is for the preparer. It will print and proforma. Notes to the client should be listed on the Summary Sheet.

Usually check No. Cannot be volunteer preparer.

*The PTIN field should have an entry by default and the **IRS only** box should be checked. If not, please contact your site manager. Do not enter any other information in Preparer Information.*

Use these fields for information that is helpful to your site. For example, these fields could be used to enter the preparer's name and/or new versus returning taxpayers. These fields are used by the military to report rank, grade, enlisted/ retired, etc.

After the end of the tax season a custom report can be created.

Check information on the Main Information Sheet for accuracy and complete any required fields. When complete, close form.

Note: Preparer Use Fields are for site's use and are defined by the site coordinator.